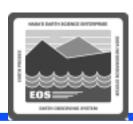


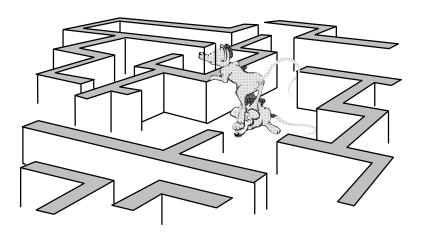
CONFIGURATION MANAGEMENT

ECS Release 5B Training

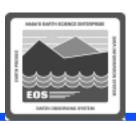
Overview of Lesson



- Introduction
- Configuration Management Topics
 - M&O role in CM activities
 - Configuration Control Boards (CCBs)
 - Configuration Change Request (CCR) Process
 - Software Change Process
 - Hardware Change Process
 - Baseline Change Process
- Practical Exercise

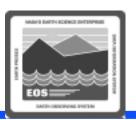


Objectives



- Overall: Proficiency in ECS Configuration Management
 - Describe M&O role in CM activities
 - List Configuration Control Boards (CCBs), roles, and responsibilities
 - Process a Configuration Change Request (CCR)
 - Prepare a request for impact analysis
 - Process a software change
 - Review Configuration Parameters in Configuration Registry
 - Process a hardware change
 - Process a baseline change Not currently fully supported

Importance



Lesson provides preparation for several roles to ensure effective CM for implementation of system changes



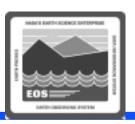
- CM Administrators
- System Engineers, System Test Engineers,
 Maintenance Engineers

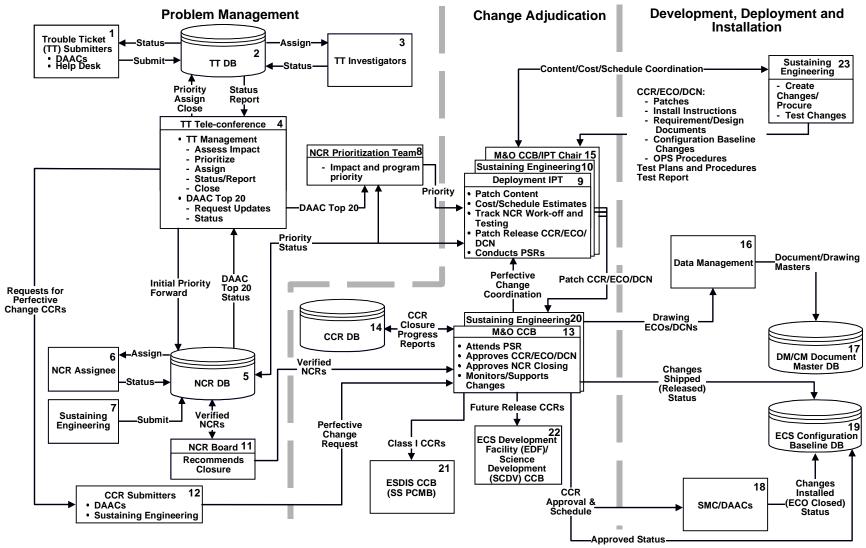
M&O Role and CM Activities



- Maintenance and Operations CM activities
 - After acceptance of ECS
 - Administrative and technical support of change control
 - Documentation and coordination of changes to site hardware, software, and procedures
 - Configuration identification
 - Maintenance and control of technical documentation
 - Configuration status accounting
 - Recording and reporting information about the configuration status of ECS documentation, hardware, and software
 - XRP-II
 - Configuration audits
 - M&O supports internal and ESDIS assessments of project compliance with relevant CM plans

M&O Role: Change Management



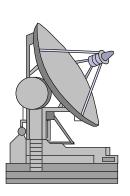


M&O Role: Science Software CM

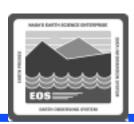


Science Software CM

- developed at Science Computing Facilities
- upon delivery to DAAC, enters custody of DAAC CMO
- SSI & T: DAAC management and I &T team
- M&O role
 - support during I & T
 - support DAAC Manager after acceptance
 - if Science Software has inter-DAAC dependencies, support coordination with affected DAACs
 - ensure any necessary coordination with ESDIS prior to moving Science Software into production operations



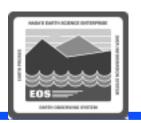
System Operations Support



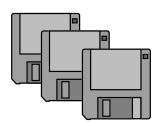
SOS -- System Operations Support

- liaison between sites and ESDIS CCB
- liaison between operations and the Sustaining Engineering Organization (SEO)
- coordination of CM functions
- maintenance of Change Request Manager (DDTS)
- oversight for dissemination of controlled items to sites
- monitoring of installed configurations of hardware and software for conformance to approved baselines
- M&O ensures coordination and availability of needed data for change management

M&O Role: Maintenance of the M&O Libraries

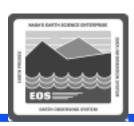


 Maintenance of M&O Documentation and Software Library



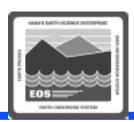
- both common and site-specific software
- site personnel responsible for CM associated with library

M&O Role: Library Administration



- Soft or hard copy maintained in library
- Document support directories
 - CUSTOM/docs: file descriptive materials
 - CUSTOM/docserver: document repository
- Microsoft Access database for library holdings and index
- Baseline Manager tool for documents that are under baseline CM control

Baseline Control



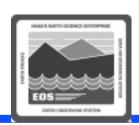
- Baseline control milestones during maintenance and operations
 - Installation Plan (IP): COTS hardware configuration
 - Consent to Ship Review (CSR): hardware and software configuration and plans for host sites
 - Release Readiness Review (RRR): documents state of configuration items at each host site
 - Operational Readiness Review (ORR): documents flightcertified, ESDIS-approved, fully integrated EGS
- Site authority
 - ESDIS authority over changes to common software
 - site CCB authority over site-specific Class II changes
 - site-specific parameters for COTS software
 - specific configuration of tools and utilities, as delegated by ESDIS

Configuration Identification



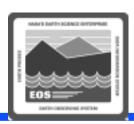
- Establishes unique identifiers for ECS control items: Hardware, Software, Databases, Documentation
- ECS System Baseline Specification identifies Configuration Items (CIs)
 - Defines configuration baseline data structure and data schema
 - Delineates how items will be named, described, versioned, and controlled
 - Defines the item's associated engineering specifications and location of the actual controlled baseline data (including the ECS Configuration Baseline database)
- Configuration Baseline may change with a new System Release or with a patch

Configuration Status Accounting



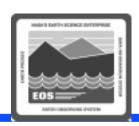
- Reports, metrics, records to support configuration management with status tracking information
 - identification and resolution of configuration problems (e.g., Trouble Ticket, NCR listings, progress reports)
 - M&O CCB review/approval of baseline changes (e.g., CCR listings,progress reports, CCB agendas, minutes)
 - monitoring progress for change implementation (e.g., ECO/DCN status reports, IPT Drop Matrix listings)
 - maintenance of ECS Configuration Baseline status (e.g. Approved/Shipped Changes, Installed Changes)
 - Verification and auditing of baselines (e.g. discrepancy metrics/reports reflecting differences between the approved and installed baselines in both the testing environment in the Verification and Acceptance Test Center [VATC] or Performance Verification Center [PVC] and at the DAACs)

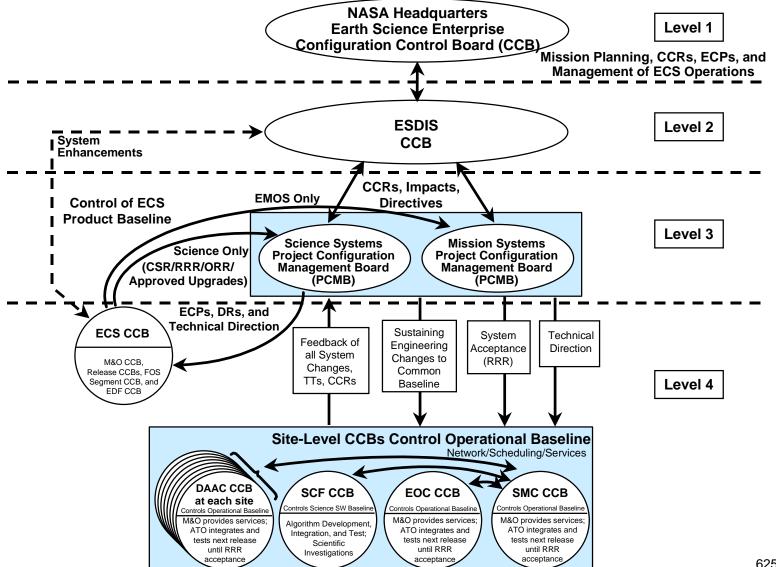
Configuration Audits



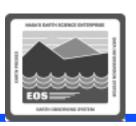
- Conducted by ECS CMO, supported by site CM
- Functional Configuration Audit (FCA) and Physical Configuration Audit (PCA) validate that:
 - as built configuration compares with the approved baseline
 - test results verify that each ECS product meets its specified performance requirements to the extent determinable by testing
 - the as-built configuration being shipped compares with the final configuration tested in the VATC
- Differences between the audited configuration and the final tested configuration are documented
- Automated scripts compare DAAC configurations to baseline documentation

CCB Hierarchy





CM Responsibilities

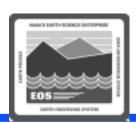


- ESDIS Management
 - establishes ECS CM policies

CCBs

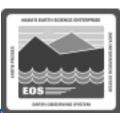
- classify, prioritize, evaluate, recommend, and approve (within their authority) changes to baselines
- CM Administrators (at SMC, EOC, DAACs, SCFs)
 - establish and maintain CM records
 - facilitate the configuration change request (CCR) process
 - monitor and report status of proposed and approved
 CM actions
 - support their respective CCB (as required)

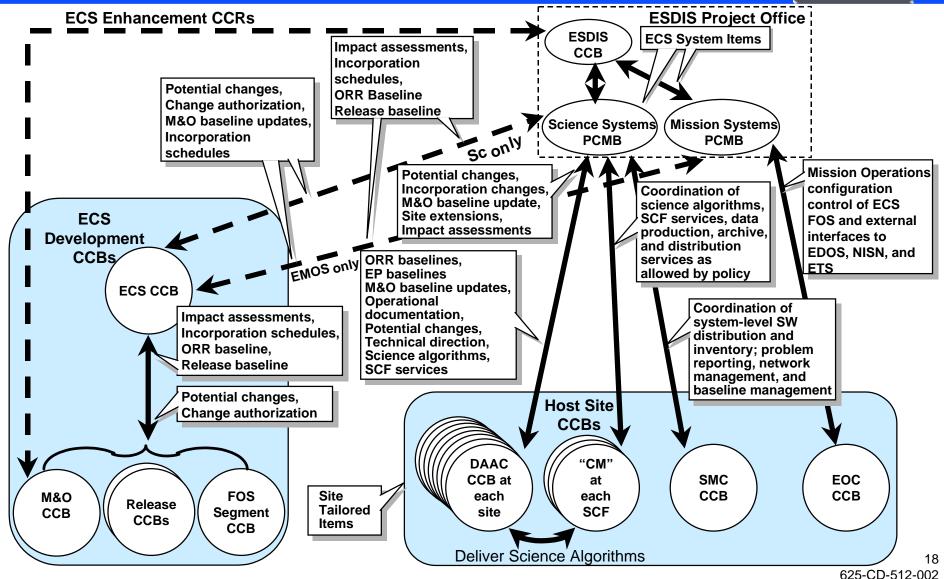
CM Responsibilities (continued)



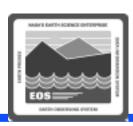
- Sustaining Engineering Organization (SEO) ---
 - assesses feasibility and cost, schedule and performance impacts of proposed system-wide changes
 - implements such changes when directed by ESDIS
- DAAC Sustaining Engineers --
 - assess DAAC impacts of system-wide proposed changes
 - develop and maintain ESDIS-approved DAAC-specific modifications to ECS products
- Maintenance Engineers ---
 - maintain ECS HW and report configuration changes resulting from maintenance actions

Operational CCB Relationships



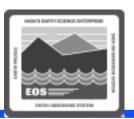


Science Software and Change Control



- Science Computing Facility (SCF) performs configuration control
 - Software and Databases to be executed at another site
 - SCF resources that are made available to EOSDIS community
- ECS M&O function directed by DAAC CCB
 - Accepts science software and data from the SCF
 - Provides services to support EOC control of the EOC operational baseline
- Central coordination by Project Control Management Board
 - ECS integrity and quality of service
 - Coordination with internal and external networks, systems, facilities
 - ESDIS CCB visibility into ECS operations
 - Convenient user administrative services

Configuration Change Requests (CCRs)



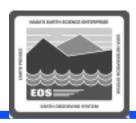
No undocumented changes

- all requests for change documented using CCR form
- CCR generated against the baseline affected by the proposed change
- Form can be completed electronically
 - Word processing form
 - Change Request Manager tool (CM Administrator)

CCB review

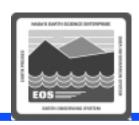
- CCR submitted to appropriate CCB
- CCR form may also be a cover sheet for a request to
 CCB for a deviation or waiver from baseline

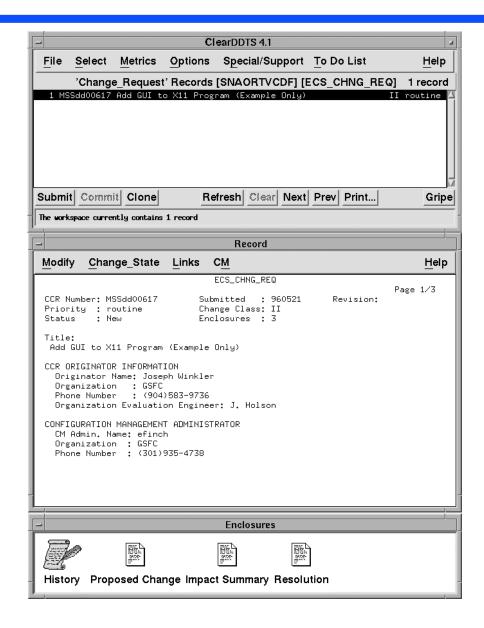
ECS CCR Form



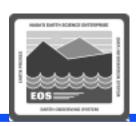
Core System (ECS) Configuration Change Request (CCR)			
	ard (CCB) DAAC: GSFC, LaRC, SIDC, ORNL EOC:	R No.	
3. Submitted Date: 4. Revision	5. Priority Emergency Urgent Routine	ss 7. Status	
8. CCR Title:			
9. Originator: 10. Approval:signatui	Org: e-mail:	phone:	
11. Reason for Change		Participal and American	
12. Description of Change	·	dicate attachment) dicate attachment)	
12. Description of Change 13. Impact Analysis: Cost: None Smal (Not exceeding \$	Medium	dicate attachment) Je 00,000)	
12. Description of Change 13. Impact Analysis: Cost: None Smal (Not exceeding \$ Evaluation Engineer: Impact Evaluators: ESDIS; LaRC, ASF, ED	(in Medium Larg (Over \$5 Org: e-mail: ECS Dev; SEO; SMC; DAACOC, JPL, NSIDC, ORNL; ECC, GRAL; COC, STAL; ECC, CRAL; ECC, CRAL, CRAL	dicate attachment) je 00,000) phone: ss: GSFC,	
12. Description of Change 13. Impact Analysis: Cost: None Smal (Not exceeding \$ Evaluation Engineer: Impact Evaluators: ESDIS LARC, ASF, ED Others 14. Comments: (Indicate Sites/ Comments: Impact Evaluation)	(in Medium Larg (Over \$5 Org: e-mail: ECS Dev; SEO; SMC; DAACOC, JPL, NSIDC, ORNL; ECC, GRAL; COC, STAL; ECC, CRAL; ECC, CRAL, CRAL	dicate attachment) je 00,000) phone: ss: GSFC, DC, dicate attachment) dicate attachment) erred Until date	

Change Request Manager (DDTS)



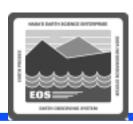


Request for Impact Analysis



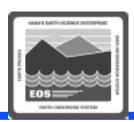
- Support of ESDIS CCB may require assessment of the impact of a proposed CCR on local or system maintenance and operations
- Assessing the impact of CCRs with significant system implications and/or potential system-wide application may require the assistance of the ECS development organization
- Formal request for impact assessment according to Mission Operation Procedures for the ECS Project (611-CD-510-001)
- Impact assessments consolidated into a CCR Impact Summary

CCR Impact Analysis Form



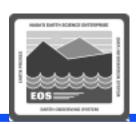
Responder Request Number:	Evaluation Engineer:
Responder:	Evaluation Engineer Point of Contact:
Responder Point of Contract:	address:
address:	
	
phone:	
e-mail:	Requested Return Date:
CCB Schedule Date:	
CCR Number:	
CCR Log Date:	
CCR Originator:	
CCR Originator Point of Contract:	
address:	
phone:	-
e-mail:	
	·
Basis of Estimate: Technical Assumptions and Comments: Cost Impact: None [] Small [] < \$100,000 Medium [] \$100,000 < x < \$500,0 Large [] > \$500,000	00
Technical Assumptions and Comments: Cost Impact: None [] Small [] < \$100,000 Medium [] \$100,000 < x < \$500,0	000

CCR Impact Summary



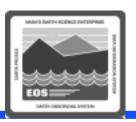
CCR Impact Summary			
Evaluation Engineer: Evaluation Engineer Point of Contact: address:			
phone:			
e-mail: CCR Board Date:			
Resources Summarized:			
Technical Summary:			
ROM Summary (BOE, Cost, and Schedule):			
Recommendation:			
	Signed: (Evaluator) Date:		

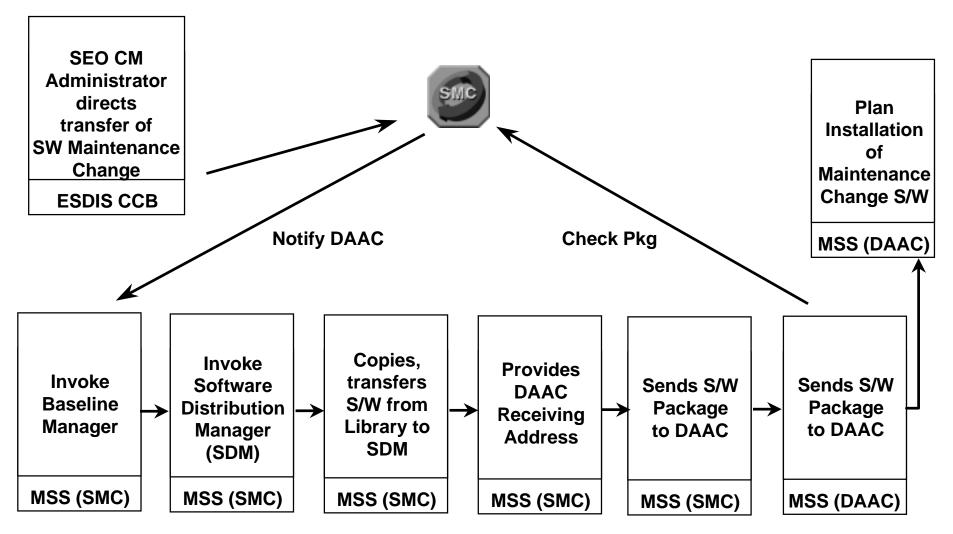
Software Baselines and Changes



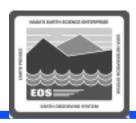
- Software release is through ESDIS SMC or, with ESDIS permission, directly to the sites
 - Version Description Document (VDD) provides summary documentation package
 - ECS Project CMO assembles and packages the delivery
- Change Scenarios
 - COTS software problem
 - custom software problem
 - science software upgrade
 - COTS software upgrade
 - system enhancement

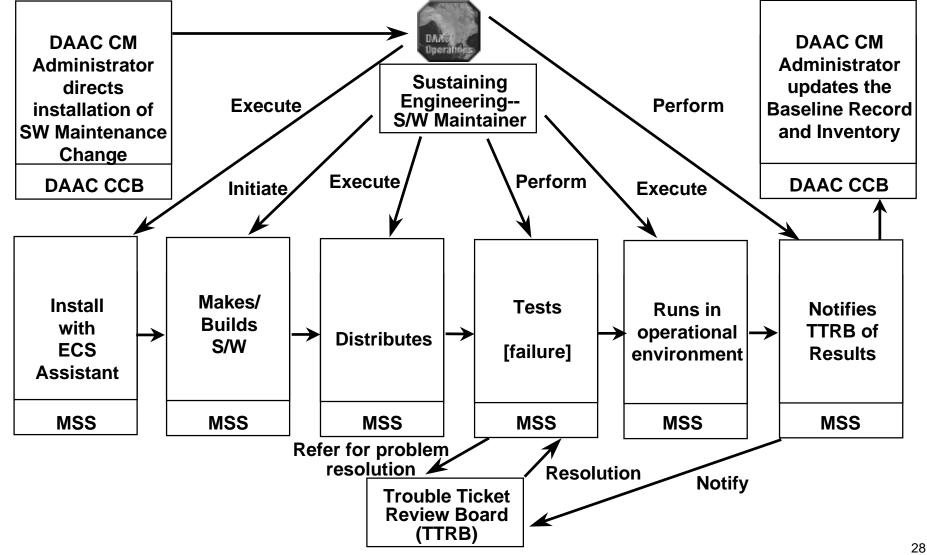
Software Transfer & Installation: Transfer Functional Flow



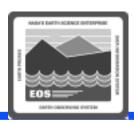


Software Transfer & Installation: Installation Functional Flow



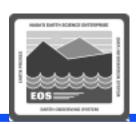


Software Transfer



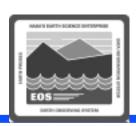
- When software maintenance change package is ready and approved by ESDIS CCB, SEO CM Administrator requests SMC to distribute
- SMC CM Administrator promotes the change to the Operational Baseline and updates the Baseline Record and Inventory Record

Software Change Installation



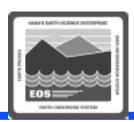
- Review/approval by ESDIS precedes systematic installation
 - VDD final updates for system and center-specific material; final VDD is published
 - Installation of the build and operational and user documentation IAW installation schedule
 - ECS Assistant for installation
 - Scripts for System Administrator to do installation
 - Controlled document updates provided to SEO
 Document Maintenance and entered into CM
 - CM system updated to reflect M&O and center-specific baselines

Software Change Installation (Cont.)



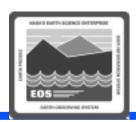
- Implementation and test of software by DAAC Software Maintenance Engineer
 - Tests individual packages (unit, subsystem, system)
 - Runs full final software in operational environment
 - Notifies SMC of results
- DAAC CM Administrator updates site baseline record using Baseline Manager (BLM) tool
 - DAAC CCR Number
 - Software package identification
 - Package name
 - Software upgrade name
 - Version
 - File structure
 - Type
 - Installation date

Configuration Parameters

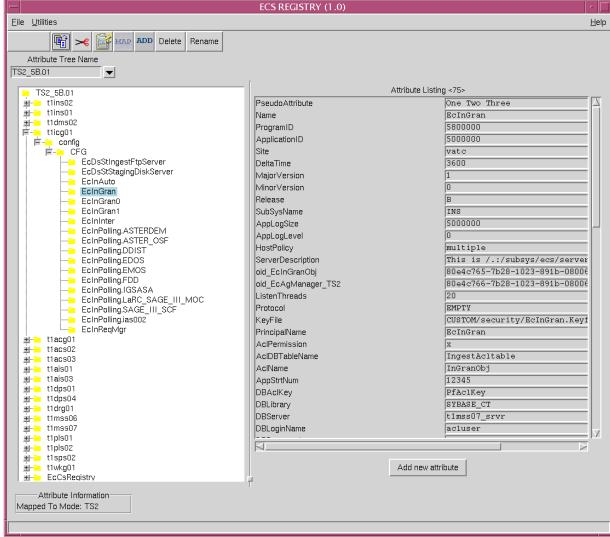


- Default settings may or may not be optimal for local operations
- Changing parameter settings
 - May require coordination among Configuration
 Management Administrator, Database Administrator,
 and Operations personnel
 - Some parameters accessible on GUIs
 - Some parameters changed by editing configuration files
 - Some parameters stored in databases
- Configuration Registry (Release 5B, 2nd delivery)
 - Script loads values from configuration files
 - GUI for display and modification of parameters
 - Move (re-name) configuration files so ECS servers obtain needed parameters from Registry Server when starting

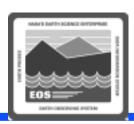
Configuration Registry







Configuration Registry (Cont.)



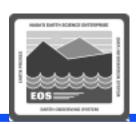
— Attribute Information			
Attribute Information Attribute Name ListenThreads	Configured Values		
Description Update Attribute Attribute Properties Attribute Data Type String MIN: 0 MAX: 0	Change Comment		
Update attribute properties	Update Delete Create Properties		
Ok	Exit		

Hardware Baselines and Changes



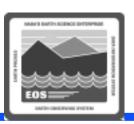
- Hardware baseline established at Release Readiness Review (RRR) following formal Physical Configuration Audit (PCA) and Functional Configuration Audit (FCA)
 - ESDIS approves establishment of operations baseline
 - Configuration baseline recorded in Engineering Release Record
 - M&O conducts testing of builds to ensure proper implementation of CCRs with no defects introduced
- Change Scenarios
 - COTS hardware problem repair that requires a CCR
 - System enhancement

Hardware Change Installation

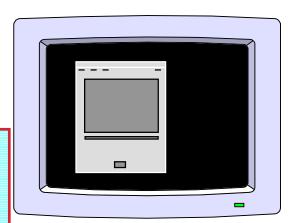


- Repair with part of same make, model, version does not require CCR
- Change in make, model, version of a part to be used for repair, e.g., in an emergency, necessitates CCR to document the change
 - Review/approval by site CCB
 - Review by SEO/ESDIS for impacts/applicability to other sites
 - Provision of controlled document updates to SEO Document Maintenance and entry into CM
 - CM system updates to reflect change
 - Audits (FCA/PCA)

Changes to the Baseline

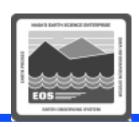


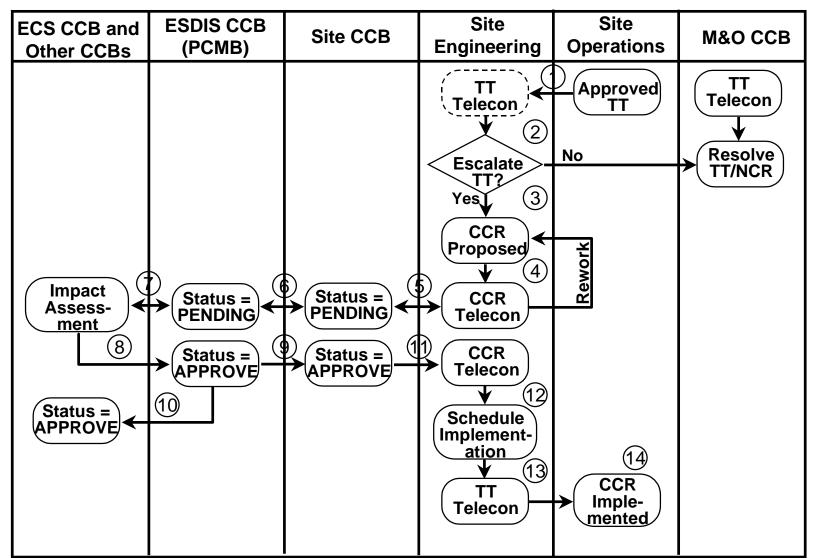
- CM Tools for baseline changes
 - Change Request Manager: DDTS
 - Baseline Manager: XRP-II
 - Inventory/Logistical Manager: XRP-II
 Incomplete: Baseline Database may not be deployed; Inventory Database for information only



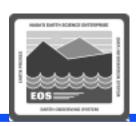
- Related tools
 - From Management Subfunction software
 - Trouble Ticket System (TTS)
 - Problem reporting and tracking
 - Used by users, operators, system administrators

CCR Approval Flow



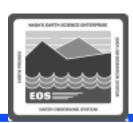


Baseline Terms and Concepts



- Baseline Management is to identify and control baselined versions of hardware and software, and maintain a complete history of baseline changes
- Control Item is any ECS item under version control by CM
- Configuration Item (CI) is an aggregation of hardware, firmware, software, or any discrete component or portion, which satisfies an end user function and is designated for configuration control
- Baseline is a configuration identification document or set of such documents formally designated by the Government at a specific time in the life cycle of a CI
- Configured Article is a control item reportable as part of the Configured Articles List (CAL)

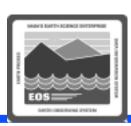
Baseline Terms and Concepts (Cont.)



ECS Structure and Baseline Terms

- Assembly: an item made up of other items
 - Parent: a higher-level item (e.g., an assembly)
 - Child: an item that is a component of a higher-level item
- Bill of Material: list of items that comprise an assembly
- Product Structure: the parent-child pairings that define the bill of material for an assembly; each product structure record specifies the effective dates and quantities for a single component of a parent for each engineering change
- Active Date: the date a component becomes effective in an assembly's bill of material
- Inactive Date: the date a component is no longer effective in an assembly's bill of material

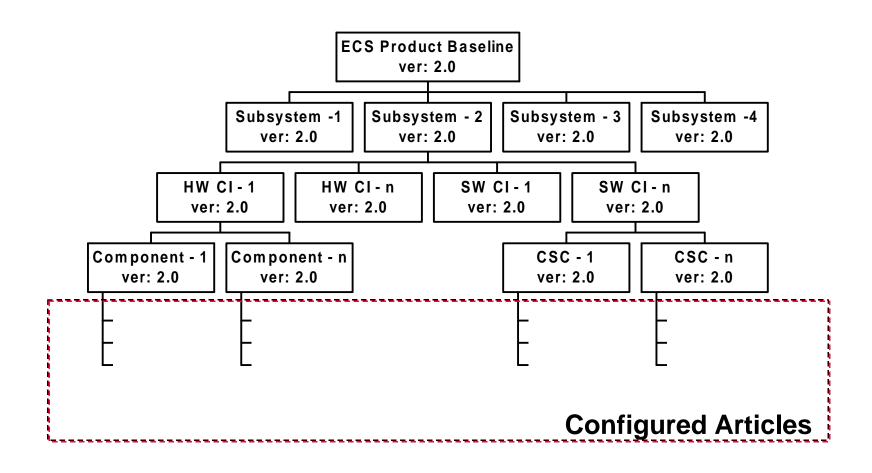
Baseline Terms and Concepts (Cont.)



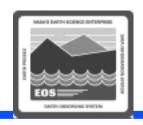
- ECS Structure and Baseline Terms (Cont.)
 - Engineering Change: a mechanism for grouping, reporting, and controlling product changes collectively
 - Revision: sequence number of a product structure change to an assembly; signifies a change to the configuration of an assembly that does not alter its form, fit, or function
 - Implementation Status: a record describing the deployment of a control item to a site and the current state and associated date of its implementation; each control item has one record for each site to which it is deployed
 - Exporting Data: creating a formatted file or records extracted from the BLM database; control item engineering change, product structure, and interdependency records may be extracted and sent to another BLM site via ftp
 - Importing Data: loading BLM data from a formatted file

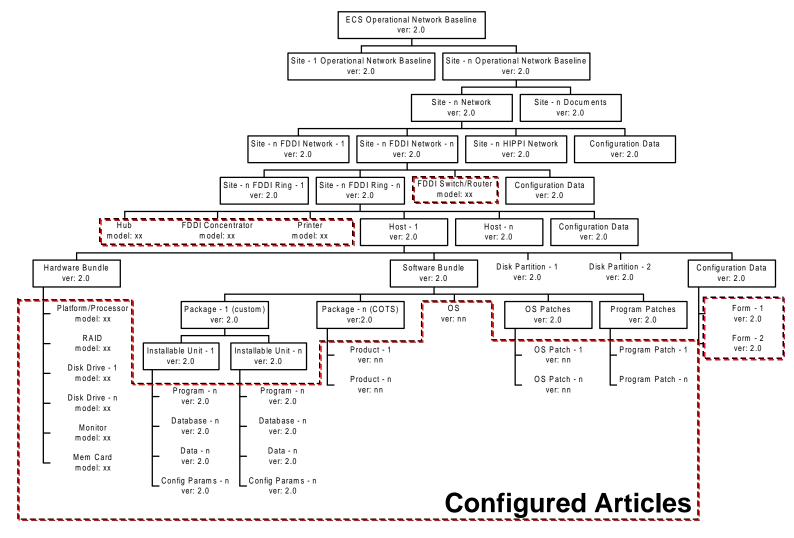
Product Structure - Design View



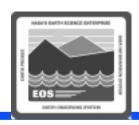


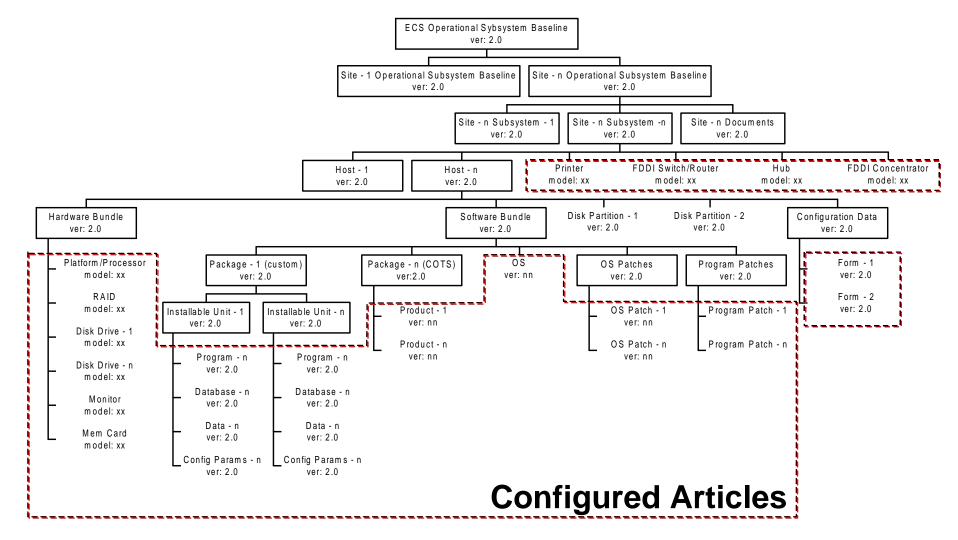
Product Structure - Operational (Network) View



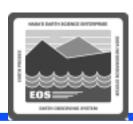


Product Structure - Operational (Subsystem) View



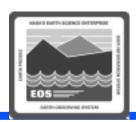


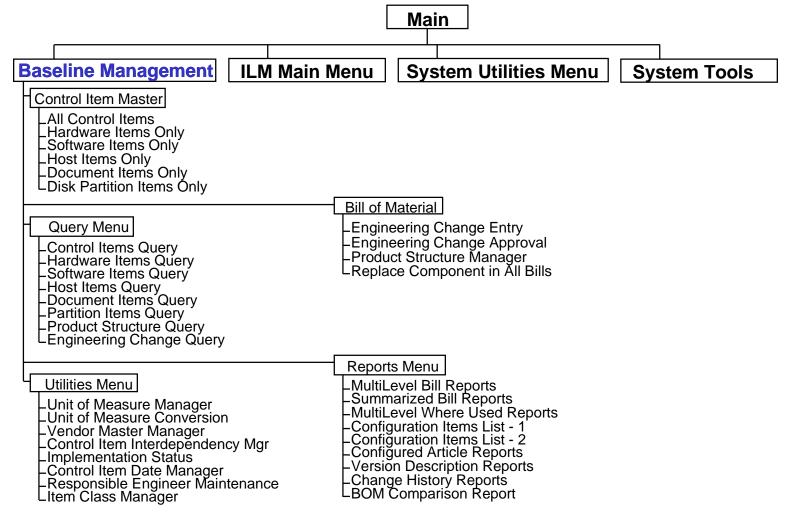
XRP-II Main Screen



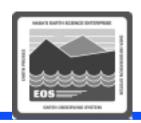
_	XRP-II – Baseline User	4 🗆	
mainm	ECS Management System Main Menu	09/12/97 11:15	
	1. Baseline Management		
	2. ILM Main Menu		
	3. System Utilities Menu		
	4. System Tools		
	Please enter selection (1 - 4 or name): [
F1-help F3-prior menu F5-select F8-exit			

XRP-II Hierarchical Menu Structure



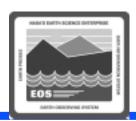


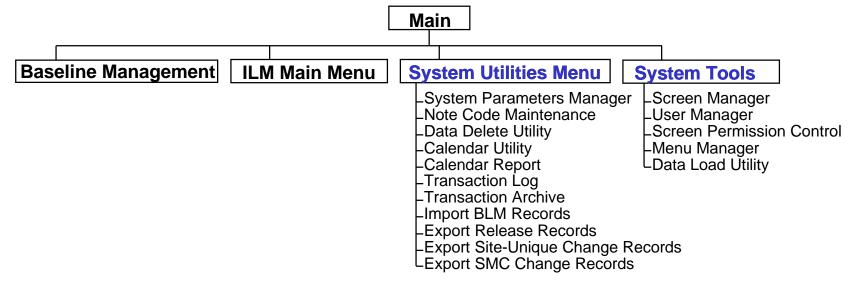
XRP-II Hierarchical Menu Structure (Cont.)



<u> Main</u>			
Baseline Management	LM Main Menu System Utilities	Menu System Tools	
	EIN Transactions LEIN Installation LEIN Shipment LEIN Transfer LEIN Archive LEIN Relocation Linventory Ordering Many	EIN Menu LEIN Entry LEIN Manager LEIN Structure Manager LEIN Inventory Query	
Maintenage Many	Inventory Ordering Menu Order Point Parameters Manager Generate Order Point Recommendations Recommended Orders Manager Transfer Order Point Orders Consumable Inventory Query Spares Inventory Query Transfer Consumable & Spare Mat'l	LILM Inventory Reports LIN Structure Reports Install/Receipt Report EIN Shipment Reports Transaction History Reports PO Receipt Reports Installation Summary Reports PO/Receiving Menu	
Maintenance Menu -Maintenance Codes -Maintenance Contracts -Authorized Employees -Work Order Entry -Work Order Modification -Preventative Maintenance Items -Generate PM Orders -Work Order Parts Replacement History -Maintenance Work Order Reports -Work Order Status Reports	ILM Master Menu Employee Manager Assembly Manager System Parameters Manager Inventory Location Manager Buyer Manager Hardware/Software Codes Status Code Manager Report Number Export Inventory Data Transaction Log Transaction Archive OEM Part Numbers Shipment Number Manager LCarriers	-Material Requisition Manager -Material Requisition Master -Purchase Order Entry -Purchase Order Modification -Purchase Order Print -Purchase Order Status -Receipt Confirmation -Print Receipt Reports -Purchase Order Processing -Vendor Master Manager	

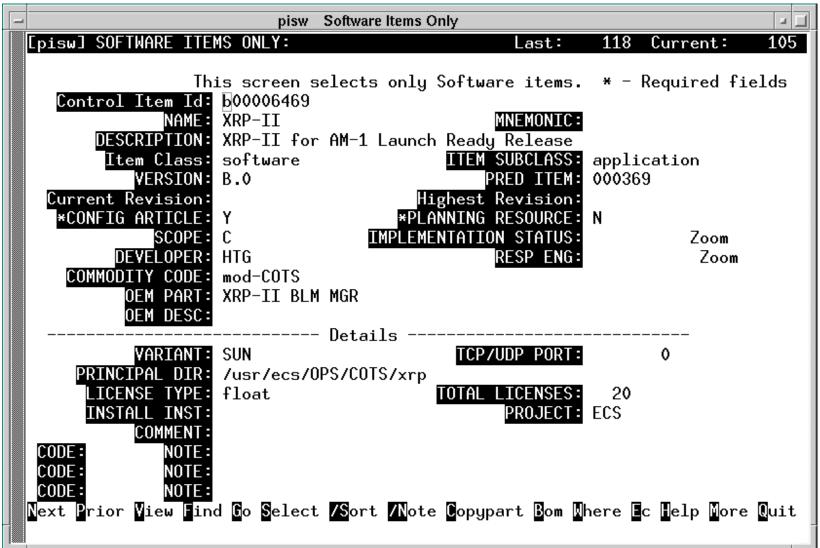
XRP-II Hierarchical Menu Structure (Cont.)





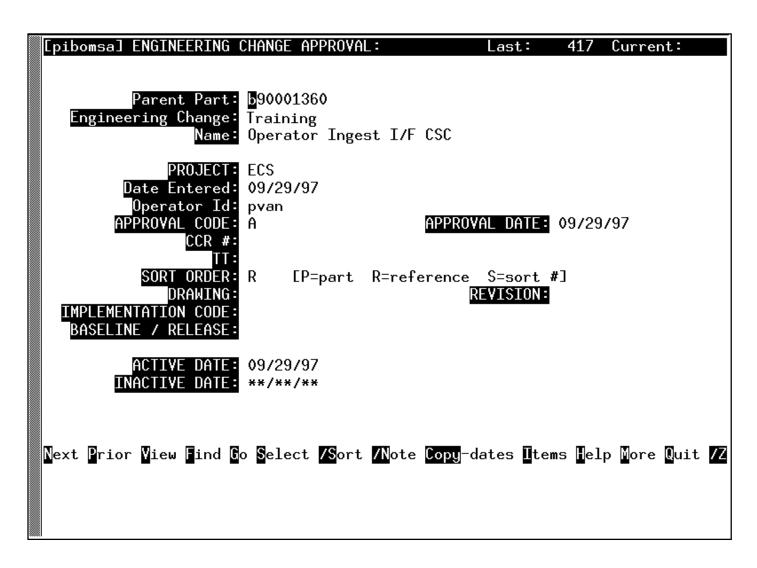
BLM Software Items Only CHUI





BLM Engineering Change





ILM EIN Entry & Manager Screens

